User Manual

For

Hephaestus

Process Modeling Operating System

Version 8.4

Hephaestus
User Manual

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1. Introduction

Traditionally, companies have used a text-based approach to document, distribute, and maintain their processes. That has led to process gaps, conflicts, delayed process maintenance, and difficulty navigating the process environment. These issues have confused the user community and disregard the processes.

Process modeling uses graphical symbols to represent processes. It improves readability, understandability, and maintainability. In addition, creating and deploying processes is faster than word-driven process documentation.

Hephaestus is an operating system used to visualize the flow of work in an organization.

2. New User

A new user must sign up to access Hephaestus.

2.1. Sign-up

2.1.1. From the “Welcome to Hephaestus” screen, click the menu item **Hephaestus**.
2.1.2. Then click the drop-down menu item System, then click Signup.
2.1.3. Complete the Process Modeling Signup form.
2.1.4. Click Sign-up.

2.2. Role

2.2.1. Developer role creates and maintains process maps and navigation maps. This includes all map and model elements. Note: typically, the process group would act as the developer role.
2.2.2. Quality role evaluates (audits) process execution against the defined process (e.g., process models). Results are captured on the quality badge on the model process (blue box) as compliant (green), partially compliant (yellow), not compliant (red), or not audited (white).
2.2.3. User role is read-only. No changes are allowed to process maps and navigation maps.
2.2.4. Project Lead (defined under User role) would identify the processes (via tailoring) for a given project and identify the start and stop execution of each model process.

3. Login

- From the “Welcome to Hephaestus” screen, click menu **System**.
- Click **Login**.

4. Logout

- Click the logout symbol  located top far right corner

5. Process Map

The process map is a hierarchical view of process models. Each process model belongs to a specific environment (workspace, workflow, and activity flow). A process model may be connected to other process models for a given workspace.

The workspace is the top-level view. It consists of one or more workflows. A workflow consists of one or more activity flows. An activity flow is the bottom view and contains the visual process flows.

For example, the ACME company could be the workspace with sub-organizations (workflows) engineering, manufacturing, or human resources. Each sub-organization would contain processes (activity flows) representing their work.

An environment must be created (or restored) before a process model or navigation map can be defined, modified, or viewed.

5.1. Create a New Environment

5.1.1. Click the drop-down menu item **Environment**
5.1.2. Click Create Environment
5.1.3. Complete the **Create Environment** form

5.2. Restore Environment

5.2.1. Click the drop-down menu item **Environment**
5.2.2. Load Model
5.2.3. Complete **Load Model** form

5.3. Save Model

5.3.1. Click the red Not Saved button 

to save the model
5.3.2. The auto-save feature occurs every 10 minutes

6. Model Elements

6.1. Swim lane

A swim lane is a collection of processes, artifacts, and connectors. The related processes are connected, using artifacts, to create a process flow that satisfies a specific outcome. Swim lanes are assigned an accountability role ensuring processes are completed.

6.1.1. Add Swim Lane

6.1.1.1. Press and hold the Shift key, then Left-click anywhere on the white background
6.1.1.2. Complete **Enter Swimlane and Process Name** form
6.1.1.3. The new swimlane will appear at the left-click location

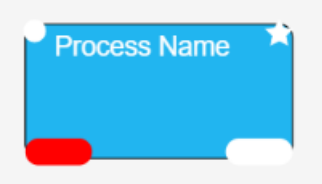
6.1.2. Rename Swim Lane

6.1.2.1. Hover the cursor over the desired swimlane name (cursor changes to an “I”)
6.1.2.2. Left-click the desired swimlane name
6.1.2.3. Enter the new name.
6.1.2.4. Click **Enter**

6.1.3. Remove Swim Lane

6.1.3.1. Right-click on the desired swim lane. Notice popup menu
6.1.3.2. Left-Click **Remove Swim Lane**

6.2. Process



Processes are interrelated activities (steps) that transform inputs into outputs to achieve a specific purpose. Processes will have one or more inputs and should be limited to one output. The corner symbols are badges that represent status.

6.2.1. Add Process Option 1

6.2.1.1. Press and hold the Shift key, then Left-Click anywhere inside a swim lane

6.2.1.2. Complete the **Enter Process Name** form. Note: The default name is Process Name

6.2.1.3. The new process will appear at the left-click location

6.2.2. Add Process Option 2

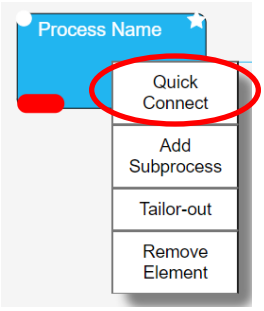
6.2.2.1. Hover the cursor over the lower part of an existing process until the cursor becomes a *hand* cursor

6.2.2.2. Right-click. Notice popup menu

6.2.2.3. Click **Quick Connect**

6.2.2.4. The new process will appear to the right of the selected process and connected to the selected process

6.2.2.5. The new process will have the default name “Process Name”



6.2.3. Badges

6.2.3.1. The upper left badge is a quality audit indicator for process compliance

- White – not audited
- Red – non-compliant
- Yellow – partial compliant
- Green – fully compliant

6.2.3.2. Upper right badge represents percent complete – 0% or 100%

6.2.3.3. Lower right badge indicates if a note has been added

- White – no note
- Dark Blue – note exists

6.2.3.4. The lower left badge indicates if a sub-process has been linked to the process

- Hidden – no sub-process has been linked
- Green – sub-process has been linked

6.2.4. Add Sub-Process

6.2.4.1. Hover the cursor over the lower part of an existing process until the cursor becomes a *hand* cursor

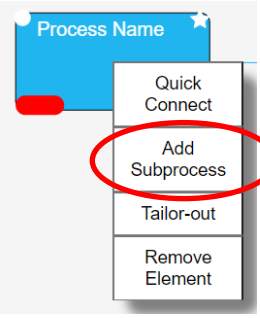
6.2.4.2. Right-click. Notice popup menu

6.2.4.3. Click **Add Subprocess**

6.2.4.4. Left-click on the models drop-down and select the desired model

6.2.4.5. Click **Submit**

6.2.4.6. Lower-left badge will turn **RED**



6.2.5. Connect Two Existing Processes

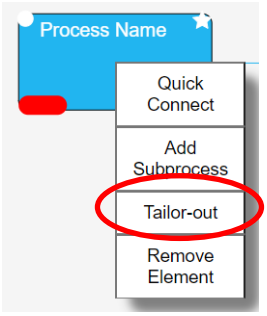
6.2.5.1. Click the “from” process. It will turn green

6.2.5.2. Click the “to” process. It will turn red

6.2.5.3. Click menu-item Connect

6.2.5.4. The arrow will point to the “to” (red) process

6.2.6. Tailor-out Process



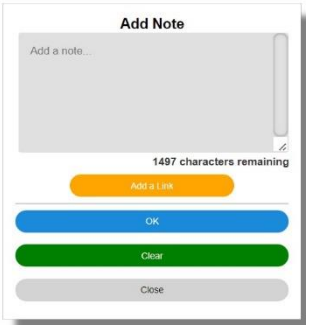
6.2.6.1. Hover the cursor over the lower part of an existing process until the cursor becomes a *hand* cursor
6.2.6.2. Right-click. Notice popup menu
6.2.6.3. Click **Tailor-out**
6.2.6.4. The process and artifacts connected to the process will turn gray with dotted lines

6.2.7. Tailor-in Process

6.2.7.1. Hover the cursor over the lower part of an existing process until the cursor becomes the *hand* cursor
6.2.7.2. Right-click. Notice popup menu
6.2.7.3. Click **Tailor-in**
6.2.7.4. The process and artifacts return to their original color with solid lines

6.2.8. Add Note

Notes can be added to processes. The note should describe the process, sub-steps, role, checklist, etc.



6.2.8.1. Hover the cursor over the lower right corner of an existing process until the cursor becomes a pointer. Note: The tooltip states “Notes”
6.2.8.2. Left-click mouse
6.2.8.3. If a previous note exists, it will be displayed. Otherwise, “Add a note…” will be displayed.
6.2.8.4. Complete the Add Note form. Note the character counter under the note area.
6.2.8.5. Click on **Add a Link** to add optional links
6.2.8.6. Enter the desired link in Link#. Links must begin with www.
6.2.8.7. Click on **Link**, the webpage will open in a new tab
6.2.8.8. When finished editing the Add Note form, Click **OK** to save changes
6.2.8.9. The lower right badge of the note will turn dark blue
6.2.8.10. If the note is deleted, the lower right badge will turn white

6.2.9. Rename Process

6.2.9.1. Hover cursor over existing process name (cursor changes to an “I”)
6.2.9.2. Left-click the existing process name
6.2.9.3. Enter the new name

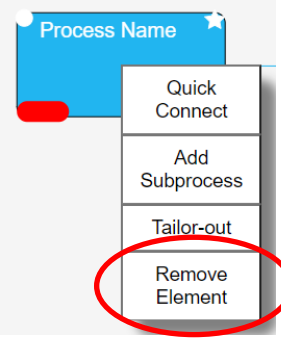
6.2.9.4. Click **Enter**

6.2.10.Remove Process

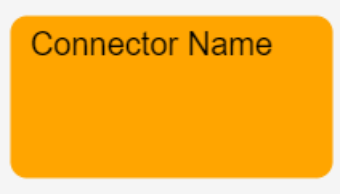
6.2.10.1. Hover the cursor over the lower right badge of the desired process until the cursor becomes the *hand* cursor

6.2.10.2. Right-click the mouse. Notice popup menu

6.2.10.3. Click **Remove Element**



6.3. Connector

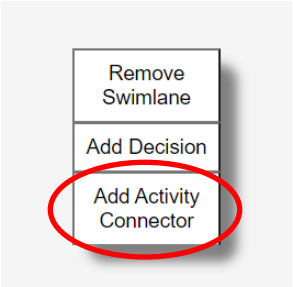


Connectors connect models across environments. For example, consider environments (workspace, workflow, and activity flow) A, A, A and A, A, B. Environment A, A, A output a1 can be connected to Environment A, A, B input b1 using a connector.

Double-click connectors to move (jump) to another environment.

6.3.1. Create Connector

6.3.1.1. Right-click on the desired swim lane. Notice popup menu



6.3.1.2. Left-Click **Add Activity Connector**

6.3.1.3. Complete the **Add Connector form**. Note: Connector Name should be the artifact name (e.g., schedule, change request, make-or-buy analysis). Also, Input and output artifacts should have the same name.

6.3.1.4. Click Submit

6.3.2. Rename Connector

6.3.2.1. Hover cursor over existing connector name (cursor changes to an "I")

6.3.2.2. Left-click the existing connector name

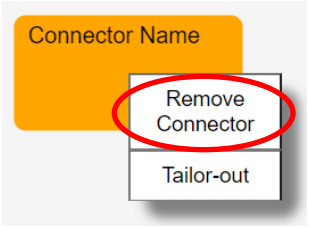
6.3.2.3. Enter the new name

6.3.2.4. Click **Enter**

6.3.3. Remove Connector

6.3.3.1. Hover the cursor over the lower part of an existing Connector until the cursor becomes the *hand* cursor

6.3.3.2. Right-click the mouse. Notice popup menu



6.3.3.3. Click **Remove Connector**

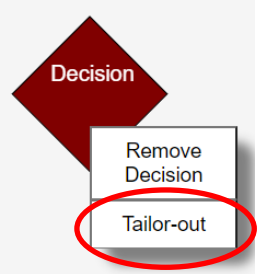
6.4. Decision

A Decision should have one input and two outputs (e.g., yes/no, true/false). The input will cause the decision to select one of the two output artifacts. The artifact label (light gray rectangle) can be used to identify the outputs.

6.4.1. Create Decision

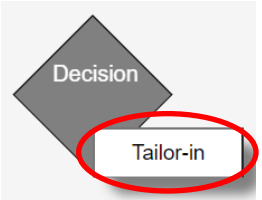
6.4.1.1. Right-click on the desired swim lane. Notice popup menu
6.4.1.2. Left-Click **Add Decision**
6.4.1.3. Populate Add Decision form
6.4.1.4. Click Submit

6.4.2. Tailor-out Decision



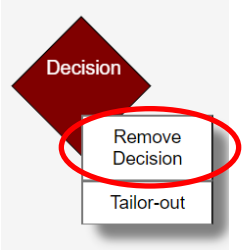
6.4.2.1. Hover the cursor over the lower part of an existing Decision until the cursor becomes the *hand* cursor
6.4.2.2. Right-click. Notice popup menu
6.4.2.3. Click **Tailor-out**
6.4.2.4. The Decision and artifacts connected to the Decision will turn gray with dotted lines

6.4.3. Tailor-in Decision



6.4.3.1. Hover the cursor over the lower part of an existing tailored-out Decision until the cursor becomes a *hand* cursor
6.4.3.2. Right-click. Notice popup menu
6.4.3.3. Click **Tailor-in**
6.4.3.4. The Decision and artifacts return to their original color with solid lines

6.4.4. Remove Decision



6.4.4.1. Hover the cursor over the lower part of an existing Decision until the cursor becomes the *hand* cursor
6.4.4.2. Right-click mouse. Notice popup menu
6.4.4.3. Click **Remove Decision**

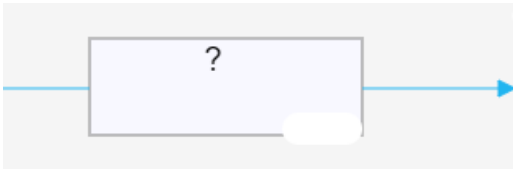
6.4.5. Connect Process to Decision

6.4.5.1. Hover the cursor over the lower part of an existing process until the cursor becomes a *hand* cursor
6.4.5.2. Left-click mouse. Note: process turns green
6.4.5.3. Hover the cursor over the lower part of Decision until the cursor becomes a *hand* cursor
6.4.5.4. Left-click the Decision.
6.4.5.5. The artifact will be connected to the Decision. Note: Artifact will have the default name of "?"

6.4.6. Connect Decision to process

6.4.6.1. Hover the cursor over the lower part of an existing Decision until the cursor becomes the *hand* cursor
6.4.6.2. Left-click mouse. Note: Decision turns green
6.4.6.3. Hover the cursor over the lower part of the process until the cursor becomes the *hand* cursor
6.4.6.4. Left-click the process.
6.4.6.5. The artifact will be connected to the Process. Note: Artifact will have the default name of "?"

6.5. Artifact



Artifacts represent work products (data) to and from model elements. The artifact can be a document or piece of data.

6.5.1. Create Artifact

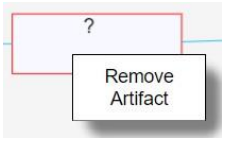
6.5.1.1. Hover the cursor over the lower part of an existing process until the cursor becomes the *hand* cursor

6.5.1.2. Left-click mouse. This is the start process. Note: process turns green
6.5.1.3. Hover the cursor over the lower part of another existing process until the cursor becomes the *hand* cursor
6.5.1.4. Left-click the process. This is the end process. Note: process turns red
6.5.1.5. Click **Connect**. Note: The artifact will have the default name of "?"

6.5.2. Rename Artifact

6.5.2.1. Hover cursor over existing artifact name (cursor changes to an "I")
6.5.2.2. Left-click the existing artifact name
6.5.2.3. Enter the new name
6.5.2.4. Click **Enter**

6.5.3. Remove Artifact



6.5.3.1. Hover the cursor over the lower part of an existing artifact until the cursor becomes a *hand* cursor
6.5.3.2. Right-click mouse. Notice popup menu
6.5.3.3. Click **Remove Artifact**

6.5.4. Add Artifact Note

Notes can be added to artifacts. The note should describe the Artifact Data.

6.5.4.1. Hover the cursor over the lower right corner of the desired Artifact Data until the cursor becomes a pointer. Note: The tooltip will state "Notes"
6.5.4.2. Left-click mouse
6.5.4.3. If a previous note exists, it will be displayed. Otherwise, "Add a note…" will be displayed.
6.5.4.4. Complete the Add Note form. Note the character counter under the note area.
6.5.4.5. Click on **Add a Link** to add optional links
6.5.4.6. Enter the desired link in Link#. Links must begin with www
6.5.4.7. Click on **Link**, the webpage will open in a new tab
6.5.4.8. When finished editing the Add Note form, Click **OK** to save changes
6.5.4.9. The lower right badge of the note will turn dark blue
6.5.4.10. If the note is deleted, the lower right badge will turn white

6.5.5. Move Artifact NEEDS UPDATE

6.5.5.1. Hover the cursor over the lower part of an existing Artifact until its border turns red
6.5.5.2. Left-click mouse. Notice the popup message box. The message box can be dragged to another part of the screen
6.5.5.3. Left-click the starting model element
6.5.5.4. Left-click the ending model element
6.5.5.5. The Artifact arrow will be connected to the ending model element
6.5.5.6. Left-Click the Clear menu option to cancel the Artifact move operation

7. Slide-in Menu

7.1. Open/Close Menu

7.1.1. Left-click the three-line-stack (“hamburger”) to display the slide-in menu
7.1.2. Move the cursor away from the Slide-in Menu to close

7.2. Menu Options

7.2.1. View Tailoring (all roles)

7.2.1.1. Hide or display tailored elements
7.2.1.2. Left-click the slider to turn off or on the tailoring view

7.2.1.3. To view tailored elements set to **ON** 

7.2.1.4. To hide tailored elements set to **OFF** 

7.2.2. View Artifact (all roles)

7.2.2.1. Hide or display Artifacts
7.2.2.2. Left-click the slider to turn the artifact view off or on

7.2.2.3. To view the artifact set to **ON** 

7.2.2.4. To hide the artifact set to **OFF** 

7.2.3. Avatar

7.2.3.1. Load Image

- The **Add an Avatar** form will appear
- Left-Click **Choose File**
- Left-Click Submit
- Click Display Image

7.2.4. Feedback

7.2.5. Process Asset Library (PAL)

7.2.5.1. Upload/Update Asset

- Left-Click Upload/Update Asset
- The Upload/Update Process Asset form will appear
- Left-Click Choose File
- Select the desired file to upload. Note: an existing file with the same name will be overwritten
- Left-Click Submit

7.2.5.2. Delete Asset

- Left-Click Delete Asset
- The Asset List will appear
- Select the desired asset to delete
- Left-Click Submit

7.2.6. Sound

Left-click Sound to toggle sound on or off

7.2.7. Switch User

The current user will be logged out and the **Hephaestus Login** form will appear

7.2.8. Tools

7.2.8.1. Copy and Delete

- Copy and delete options for environment elements (workspace, workflow, and activity flow)
- Follow pop-up forms

7.2.8.2. Check-in All Items

- All models for the current user will be checked-in
- The message ‘All maps and models are checked in’ will be displayed

7.2.9. Collaborate

Enables participants to build models in a collaborative environment. Models that are saved during a collaborative event can be imported into a model.

7.2.9.1. Host Event

- Host Collaborative Event form will appear
- Populate the Title and optional description for the collaborative session
- Any models under revision will appear in Models for Revision
- Left-Click Submit
- Click on Copy Credentials to Clipboard
- Provide copied credentials to all participants

8. Contact Information

8.1. Website

www.rpbytes.com

8.2. Email

ron@rpbytes.com